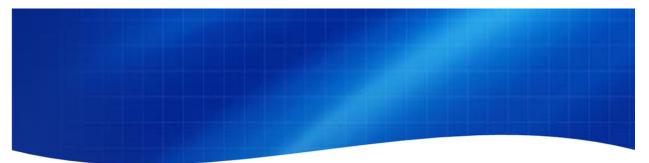
E-Grants Security User Guide – LEA Version





MTW Solutions / Grants Management System

E-Grants Security User Guide

July 2015 Version 1.1



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E-Grants Security User Guide – LEA Version



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Making Technology Work

MTW SOLUTIONS, LLC

E-Grants Security User Guide

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Revision History

Version	Status	Date	Ву	Summary of Changes
1.0	Draft	06/19/2015	BS	Draft
1.1	Draft	07/08/2015	BS	Modifications to fit updates to Logon Page
	Final	07/10/2015	BS	

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MTW Solutions, LLC – Grants Management System





Contents

Introduction	5
New User Setup	6
New Vendor/Organization Setup	11
Forgot Password	13
Authorized Representative review of user requests:	14



Introduction

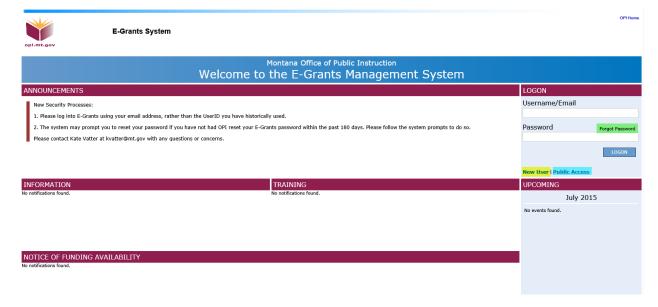
The E=Grants User Logon Page gives access to E-Grants for an LEA through users entering their Email address and assigned password.

The E-Grants User Login Page displays 3 different links available to users.

Forgot Password: The Forgot Password link allows a user to request a password if they no longer can logon because of a forgotten password. When requested, the user will receive an email with a one-time password. Upon entering this password the user will be requested to change their password following these guidelines: Minimum length 6 characters, minimum 1 uppercase letters, and minimum 1 lowercase letters.

New User: The new user link allows a user to request credentials for accessing E-Grants or to establish a new vendor/organization in E-Grants. Requests for new users will first be submitted to the Authorized Representative for the district the user is requesting to be associated with. The Authorized Representative may accept or deny the user request. If accepted the request will be submitted to the OPI Security Administrator who has the final authority to grant or deny access. Requests for new vendors/organizations will be sent directly to the OPI Security Administrator for approval.

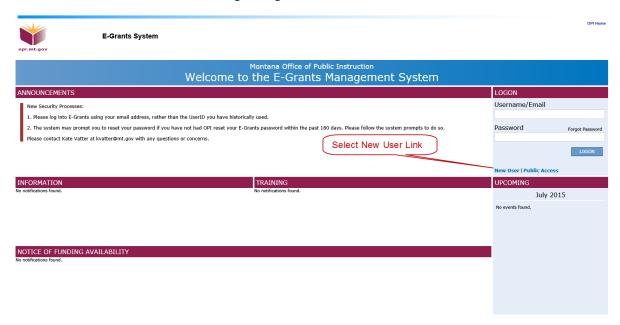
Public Access: Public access allows a user to view approved applications without entering a Username/Email and password.



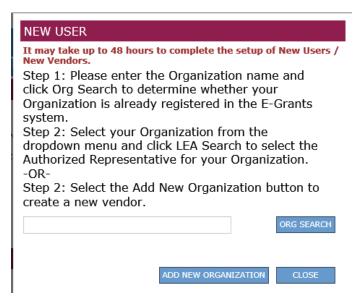


New User Setup

Select the New User Link from the Logon Page



The User will be prompted to enter the Organization Name and Click the Org Search button.





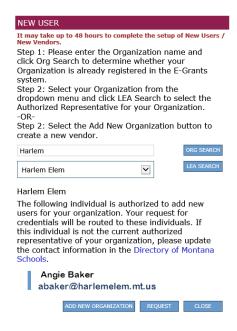


A drop down list box will appear beneath the organization name search box. This list will display all the organizations that match the search name entered. The user must select the organization name they are requesting credentials for.

NEW USER It may take up to 48 hours to complete the setup of New Users / New Vendors. Step 1: Please enter the Organization name and click Org Search to determine whether your Organization is already registered in the E-Grants system. Step 2: Select your Organization from the dropdown menu and click LEA Search to select the Authorized Representative for your Organization. Step 2: Select the Add New Organization button to create a new vendor. ORG SEARCH Harlem LEA SEARCH Harlem Elem Harlem Elementary School Harlem 7-8 Harlem H S

The next step is to select the LEA SEARCH button. The E-Grants system will search and display the authorized representative for the organization selected. The user will select the request button to request credentials.

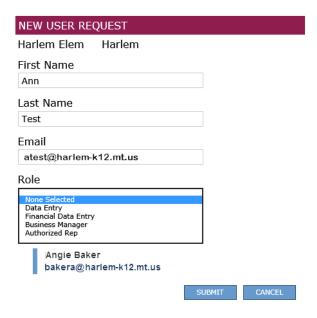
IZATION



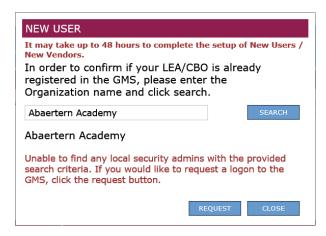
Harlem High School



New User Form-AR Found: The form presented for a new user when the authorized represented is found is displayed. New user completes the request by entering their first and last name, email address and selection of role. Roles available are Data Entry, Financial Data Entry, Business Manager and Authorized Representative.

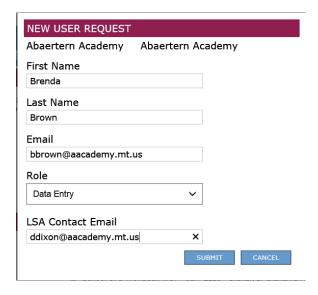


New User Form-AR Not Found: If the E-Grants system cannot find the authorized representative for the organization entered, the message displayed informs the user that the Authorized Representative has not been found within the e-Grants system. However, the user may still make a request for credentials.





The form presented for a user request where the authorized representative is not found is displayed. The new user will be requested to enter their first and last name, email address and selection of role. Roles available are are Data Entry, Financial Data Entry, Business Manager and Authorized Representative. In addition, the email address of the authorized representative for their organization will be requested.



Selection of the Submit button will cause the system to perform a crosscheck with Central via a linked server to ascertain whether an email address is available for the Authorized Representative for the organization selected.

Successful New User Request: Successful submission of the user request displays the following message. This verifies that the authorized representative was found in OPI's Central Database and has been notified that a new user request has been submitted for their review. If the Authorized Representative approves the user request, then the request will be forwarded to OPI's Security Administrator for review. If approved, the new user will receive an email notification with their password credentials. If a user is not approved then an email notification to the user informing them that their request has been denied will be sent.

NEW USER REQUEST

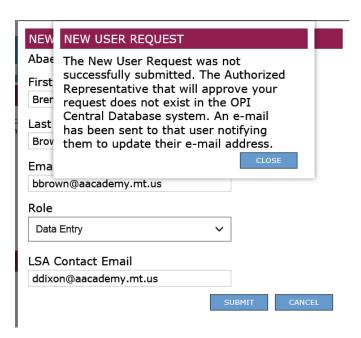
The New User Request has been submitted.

CLOSE





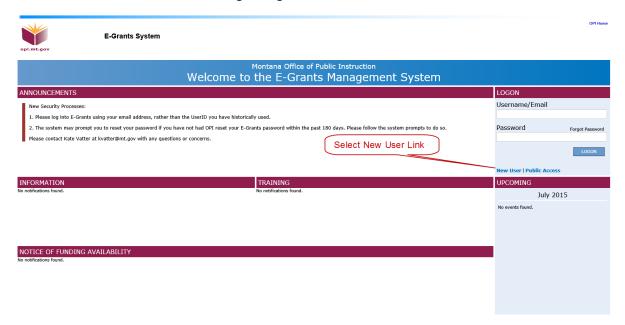
Unsuccessful New User Request: If the Authorized Representative is not found in OPI's Central Database, then the user request will not be processed and the authorized representative for the district must complete the necessary steps to establish themselves in the Central Database.





New Vendor/Organization Setup

Select the New User Link from the Logon Page



Select the Add New Organization button.

NEW USER It may take up to 48 hours to complete the setup of New Users /
New Vendors.
Step 1: Please enter the Organization name and
click Org Search to determine whether your
Organization is already registered in the E-Grants system.
Step 2: Select your Organization from the
dropdown menu and click LEA Search to select the
Authorized Representative for your OrganizationOR-
Step 2: Select the Add New Organization button to
create a new vendor.
ORG SEARCH
ADD NEW ORGANIZATION CLOSE





The New Vendor Request Form will display. The fields on the left should be completed for the new organization (organization name, address, street address, city, state, zip code, phone number and website). The fields on the right should be completed for the Authorized Representative of the district (first name, last name, email and role) along with designating the authorized representative role. A completed IRS W-9 form must be uploaded using the Browse W-9 button. In addition, a link to the OPI new Vendor Form is provided by selecting the highlighted 'new Vendor Form'. A completed new vendor form is uploaded by selecting the Browse VEN button. If an incorrect form is uploaded, simply browse and select the correct form and it will replace the form previously uploaded. When the new vendor request is correctly completed select the submit button.

NEW VENDOR REQUEST			
and uploaded Prior to proce	d to the EGrants essing a new ve	ndor request an IRS W-9 form needs to be completed . A link to the form can be found here. ndor request a new Vendor Form document also needs ed to the EGrants.	
		BROWSE W-9 BROWSE VEN	
Organization Name		First Name	
Address Street		Last Name	
City		Email	
State	Zip		
County No.		Role	
Phone		Authorized Rep 🗸	
Website			
		SUBMIT CANCEL	

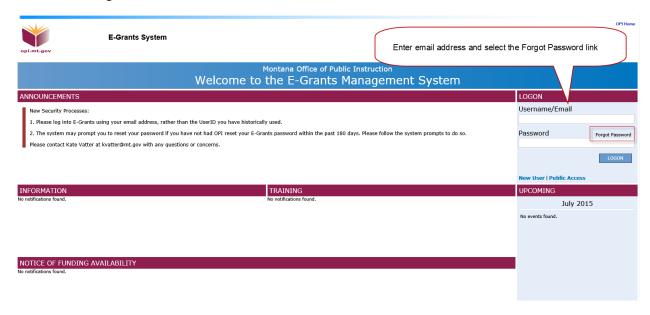
When the new vendor request is correctly completed select the submit button. A verification pop up will appear informing the user that their request has been submitted. The OPI Security Officer must approve the request. If approved the new organization will be added to E-Grants and the Authorized Representative submitted in the request will be sent an email informing him/her that her request has been approved and providing them with their password. At that time other user requests for access to E-Grants can be submitted.

NEW VENDOR REQUEST				
The New Vendor Request has b submitted.	een			
	CLOSE			



Forgot Password

If a user forgets their password and is unable to login, the user simply enters their email address and selects the 'Forgot Password' link.



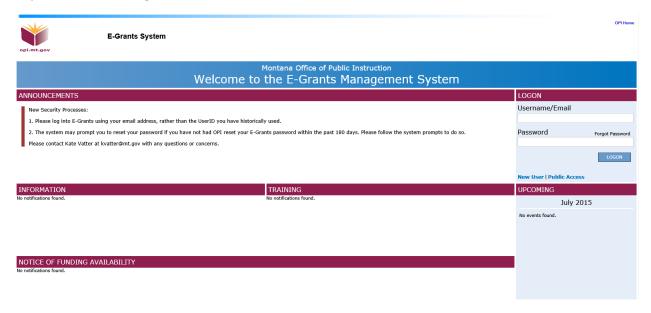
The system will then display a message informing the user that an email has been sent with a one-time logon temporary password. When the user enters this password, they will be prompted to change their password. Note the password requirements when setting up your new password.

PASSWORD EXPIRED - PLEASE CHANGE
Old Password
New Password
Confirm New Password
CHANGE CANCEL
Password Requirements
 A password must have a minimum length of 6 characters.
 A password must have a minimum of 1 lower case letters.
A password must have a minimum of 1 upper case letters.
 A password must have a minimum of 1 numeric characters.



Authorized Representative review of user requests:

When a user successfully submits a request for access to E-Grants, the authorized representative for the district will receive an email informing them of the request. To review user requests the Authorized Representative will logon to E-Grants.



At the Menu List Page, the authorized representative will find and select under the GMS Administration heading the Access Request To Do List.

GMS Administration

Access Request To Do List

If the authorized representative is associated with multiple organizations, they will need to select the correct Organization from the drop down list to display the user request.







When the user request is displayed in the table double click on the request to select.



The selected User Request will be displayed. Under the new user request heading the role requested by the new user is displayed (see text highlighted). Business roles available to the LEA staff are displayed on the left had side. By clicking assign next to one (or more) of these roles, the user is associated with that organization and moved into that Business Role for the organization. These changes are applied when the reviewer clicks Accept.

The Reject action triggers a notification to the requestors email that their request has been reviewed and denied. An Accept action triggers a notification to the OPI Security Administrator that a user request is ready to be reviewed. Final acceptance by the OPI Security Administrator is needed before a new user is established in the system.

